Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

TECH TRACKER

QUARTERLY RELEASE: Q3 2013

Technology Tracker

QUARTERLY TRACKER - TRENDS IN INTERNET USAGE, TECH OWNERSHIP AND THE CONNECTED HOME

GB FACE TO FACE SURVEY via Ipsos MORI Capibus

LATEST WAVE
QUARTER 3 2013 (Field in July)

REPRESENTATIVE SAMPLE OF 1026 GB ADULTS AGED 15+

AREAS COVERED

- Internet usage
- Connected home
- Social networking
- Smartphones/Tablets
- Music/games & movies/TV

Headlines

Internet usage

The proportion of adults accessing the internet is at 84%, with 53% now accessing via a mobile.

The top activities online remain: accessing email (77%), browsing for information on hobbies (70%), researching products and services (63%) and online shopping (57%).

Connected home

The percentage of households with connected TV increased to 14% of GB adults and 6% of these use the internet TV for various activities.

37% of GB adults have at least one of the latest generation games consoles in their household but this has seen a recent reduction in line with reduced number of households still with a Wii console.

Social networking

50% of GB adults access social network sites, more than half of these access via a Smartphone. 14% have access via a Tablet and 3% access via an internet TV.

50% of all adults have used Facebook in the past 3 months. 17% have used Twitter and an equal amount use Google+ (the Google social network site).

Smartphones

Smartphone ownership is 55%. Ownership of iPhone is at 24% and Android Smartphone ownership is head to head (23%). BlackBerry has decreased to (9%). iPhone ownership almost evenly spreads over age and gender.

Tablets

Tablets are becoming an increasingly popular device and play a significant role in people's lives. Ownership is at 3 in 10 households made up of 19% with iPad and 12% other Tablets.

Music/games & movies/TV

The proportion of adults paying for music CDs and movies on disc /Blu-rays has slightly risen year on year. Likewise official music and movie consumption has risen too.

Future Tech Monitor

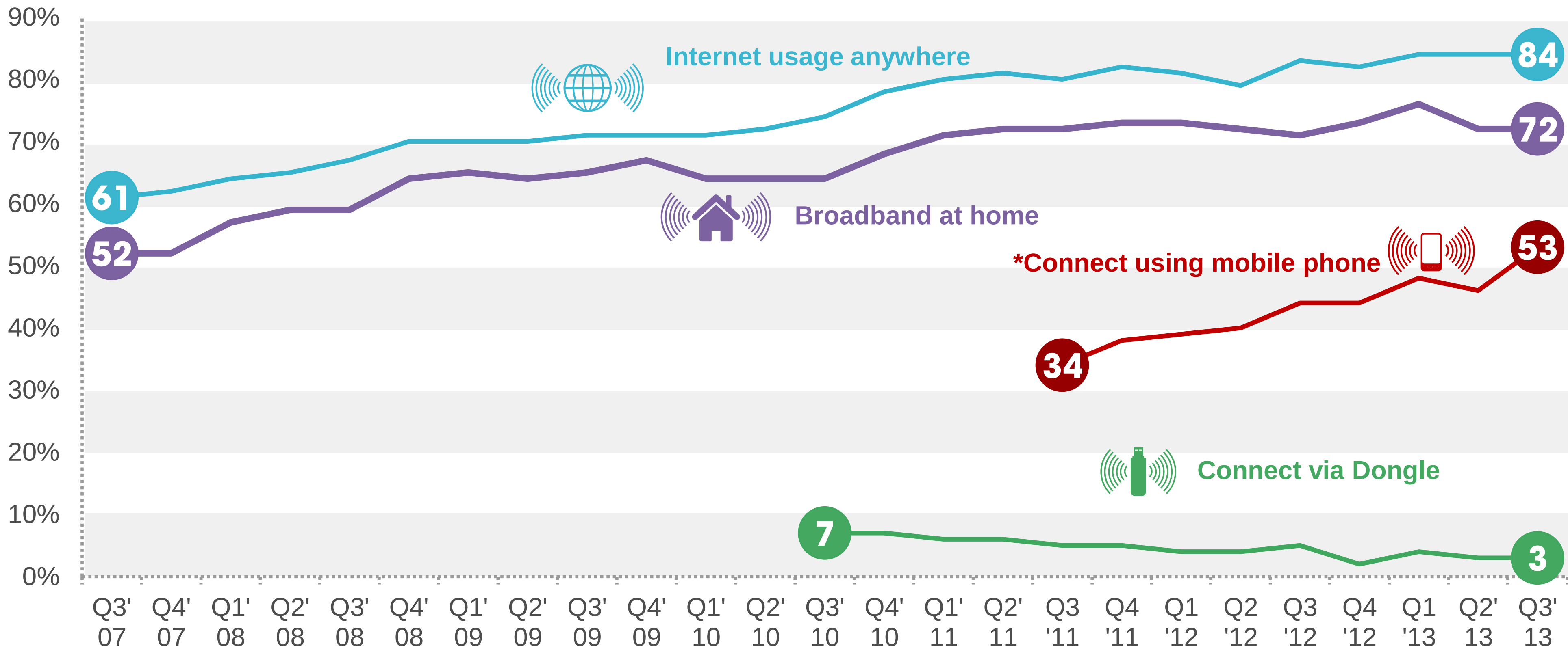
Of the new technology tracked, 3D Printers have the highest traction amongst GB adults with 36% awareness. Around 1 in 4 are aware of Driverless Cars (28%), Smart/Google Glass (27%) and Smart Watches (22%). Unsurprisingly, purchase interest is highest for technology that is now available, with 9% of GB adults aware of and interested in purchasing 3D printers, and 7% interested in Smart Watches.

INTERNET USAGE

HOW, WHEN, WHERE

INTERNET USAGE TRENDS

INTERNET CONNECTION



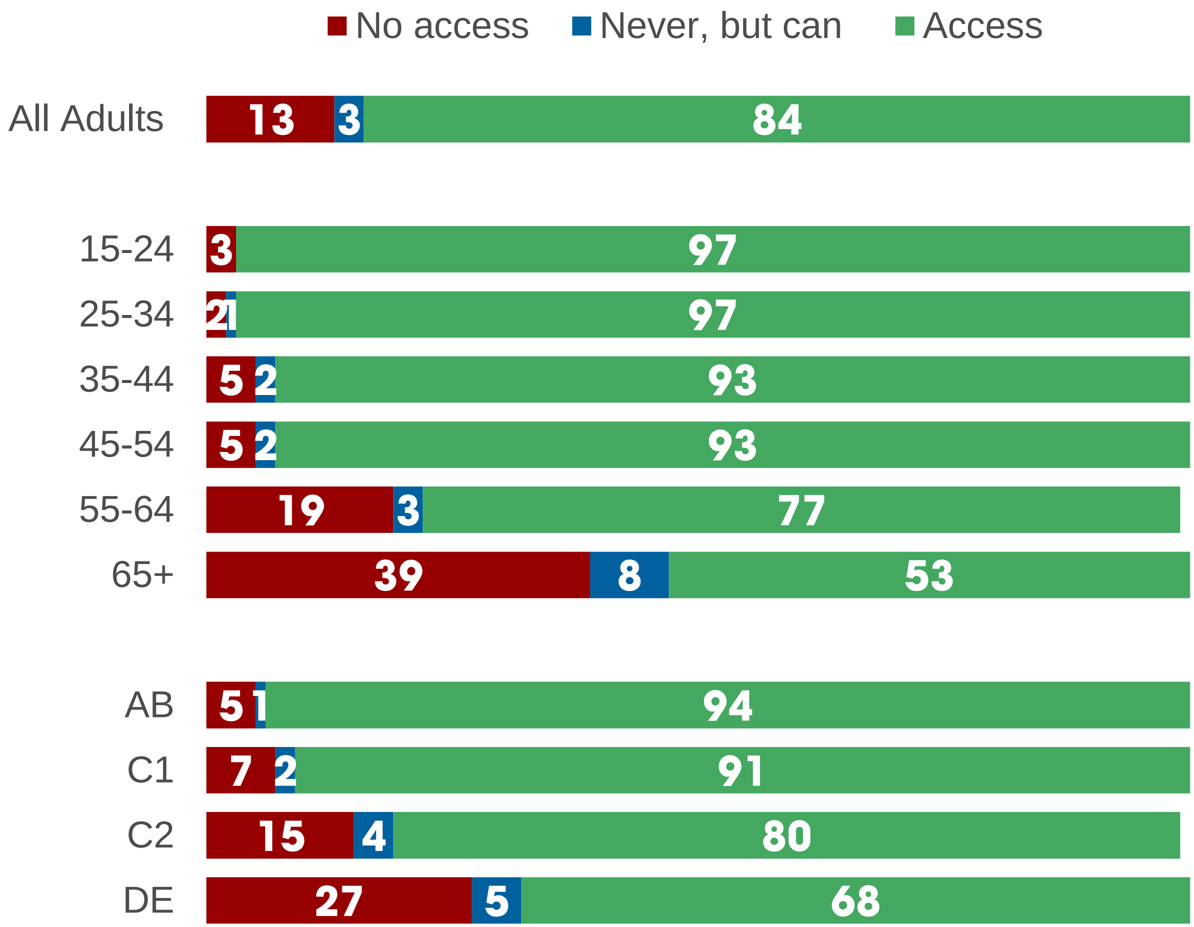
* The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown

Base: circa 2,000 interviews per wave until Quarter 1 in 2010, circa 1000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

WHO IS AND ISN'T ACCESSING THE INTERNET

% ACCESS TO THE INTERNET: Quarter 3 2013



In Quarter 3 2013, 13% of the GB adult population have no access to the internet in any way.

A further 3% of adults have the capability to access the internet but choose not to.

The digital divide is most apparent amongst some of the most socially and economically disadvantaged people. Those aged 65 or over, or from lower social grades, are more likely than average not to access the internet.

In contrast, more than 9 in 10 of those aged 15-34 or AB social grade have access to the web.

Base: circa 1,000 GB adults aged 15+: Quarter 3 2013

Source: Ipsos MORI

WHO IS AND ISN'T ACCESSING THE INTERNET

% ACCESSING THE INTERNET BY GENDER AND SOCIAL GRADE IN 2013

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	86	98	97	94	89	80	63
Males AB	95	100	100	100	100	93	86
Males C1	94	99	98	99	96	90	74
Males C2	82	99	95	96	85	74	41
Males DE	71	92	95	76	71	50	31
Females	81	92	95	94	92	77	48
Females AB	93	100	98	97	100	93	76
Females C1	88	98	96	99	93	90	56
Females C2	76	88	95	91	92	66	34
Females DE	66	86	90	84	75	53	24

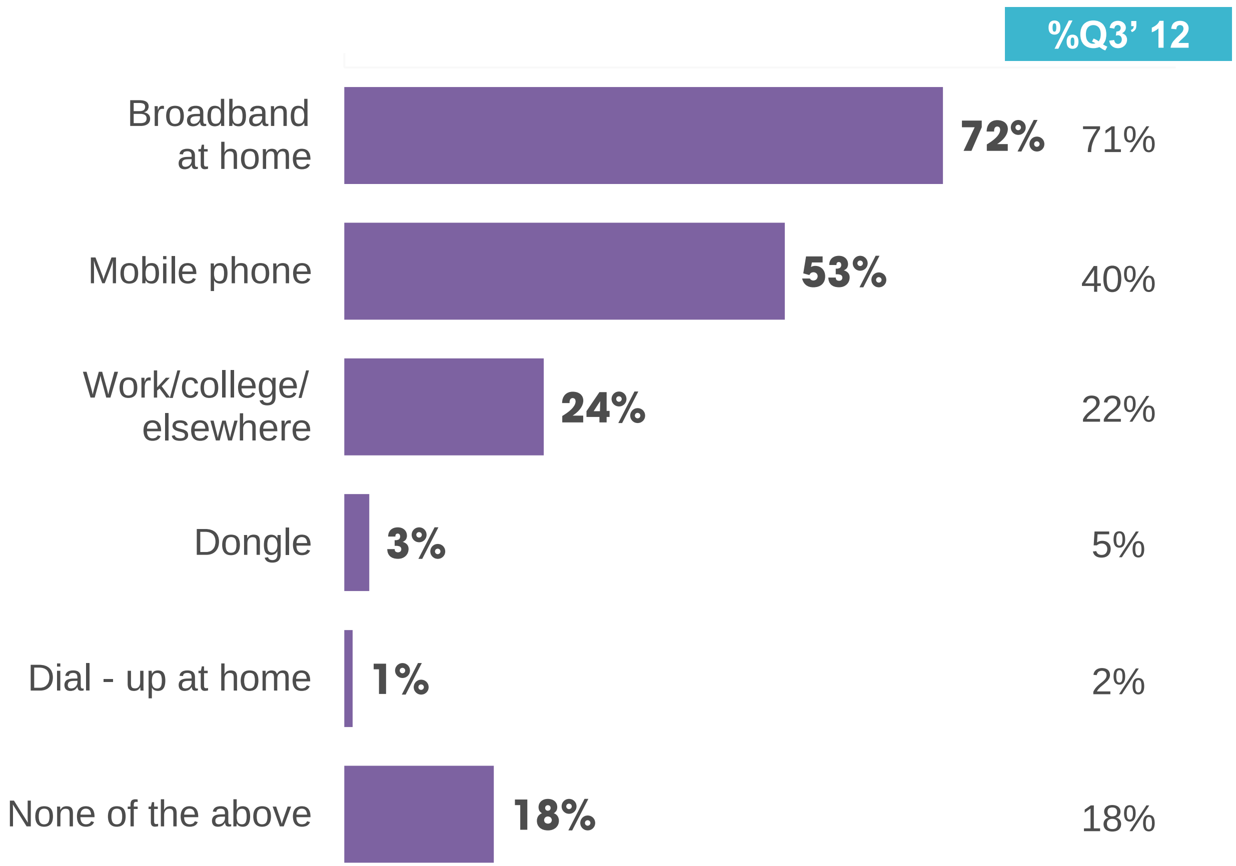
0-49% 50-79% 80-100%

Base: circa 4,000 GB adults aged 15+: Q4 2012/ Q1 / Q2 / Q3 2013

Source: Ipsos MORI

HOW PEOPLE CONNECT TO THE INTERNET

% HOW DO THEY ACCESS THE INTERNET: Quarter 3 2013



In the past year, the proportion of homes accessing the internet via broadband at home has remained at 72%.

As the proportion of Smartphone owners has increased further, 53% now access the internet via their mobile phone and only 1% access via dial-up.

Base: circa 1,000 GB adults aged 15+: Quarter 3 2013

Source: Ipsos MORI

WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS: Quarter 3 2013

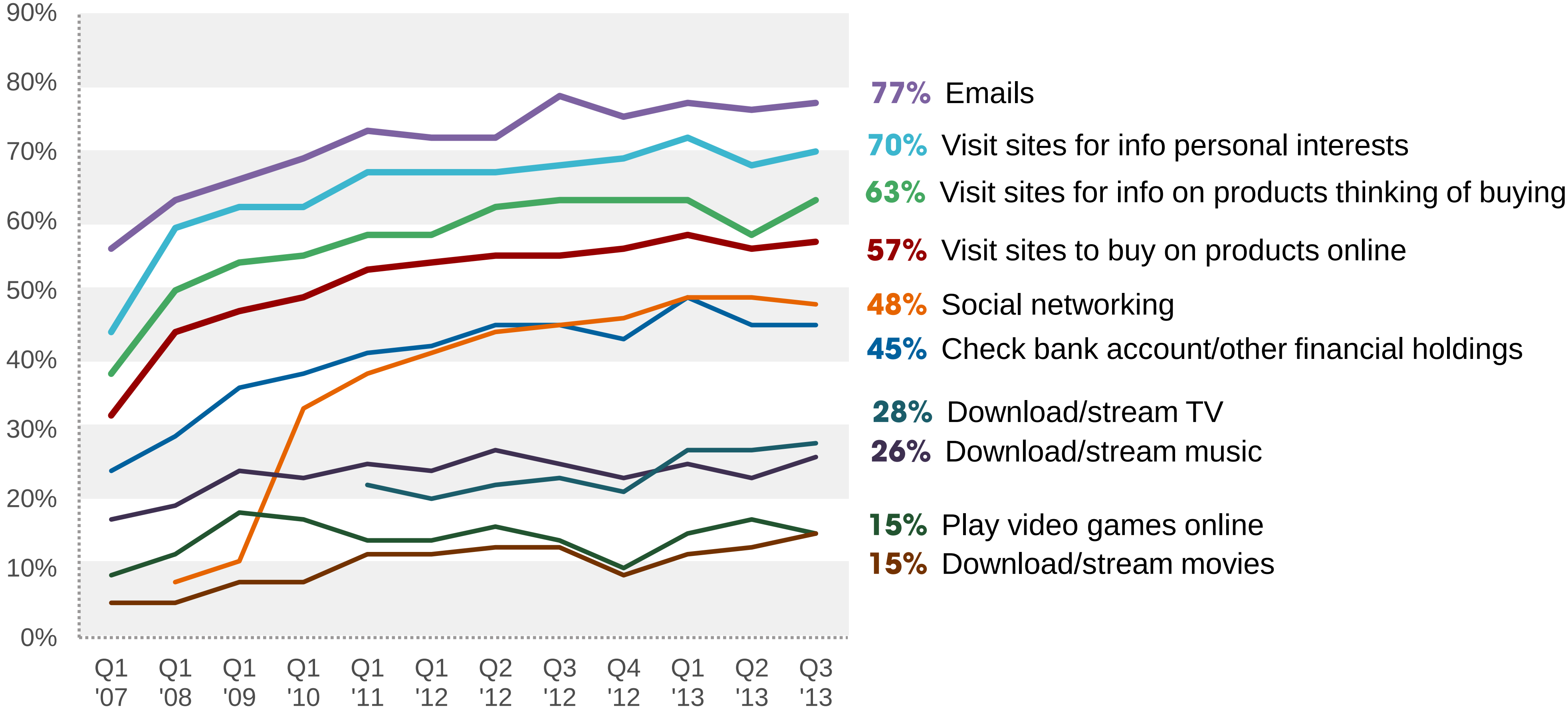
	Q3 2013	Q3' 12
For sending/receiving emails	77%	78%
Visit sites for info on hobbies and personal interests	70%	68%
Visit sites for info on products I am thinking of buying	63%	63%
To buy products/services online (not groceries)	57%	55%
Visit social networking sites /forums or blogs	48%	45%
To check bank account and other financial holdings	45%	45%
Download/stream TV (e.g. iPlayer, 4OD)	28%	23%
Download/stream music	26%	25%
Voice over IP	20%	16%
To look for a job/search job (recruitment) sites	18%	20%
Grocery shopping online	16%	18%
Play video games online	15%	14%
Download/stream movies	15%	13%
Completing surveys online	9%	10%
Online gaming/playing for money (e.g. poker, bingo)	4%	8%
For something else	10%	3%

Base: circa 1,000 GB adults aged 15+: Quarter 3 2013

Source: Ipsos MORI

CHANGING WAYS THE INTERNET IS USED

USE OF THE INTERNET IN THE PAST 3 MONTHS



Base: circa 2,000 interviews per wave until Quarter 1 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

CONNECTED HOME

EQUIPMENT IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?: Quarter 3 2013

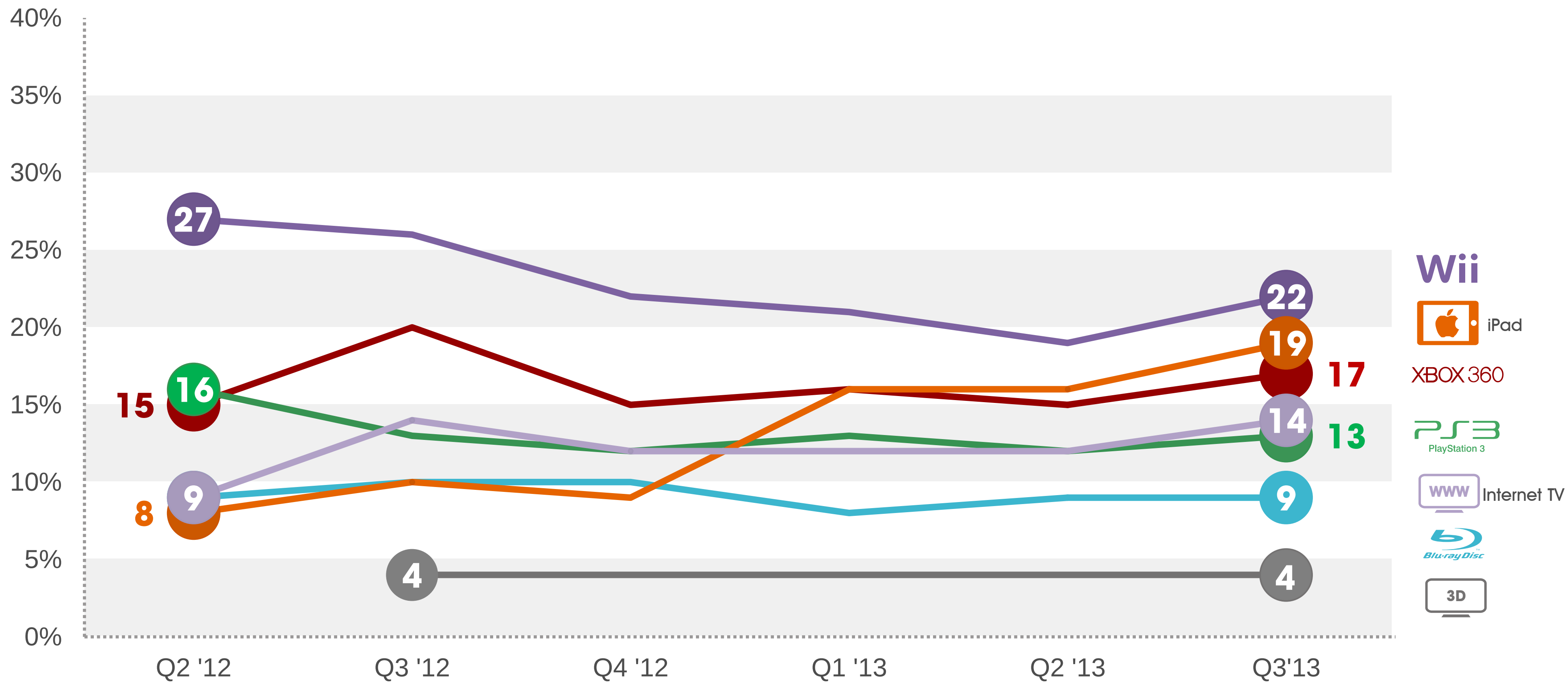
		Q3' 12
Personal computer OR Laptop	79%	80%
Laptop	64%	62%
DVD player	61%	66%
DVD recorder	24%	30%
Personal video recorder (PVR)	34%	32%
Blu-ray player (excl. PS3)	9%	10%
Digital TV via aerial/Freeview	53%	51%
Satellite TV	38%	42%
Cable TV	17%	17%
TV with internet built in	14%	14%
Freesat	5%	5%
3D TV	4%	4%
Latest generation games console	37%	40%
Wii	22%	26%
PS3	13%	13%
Xbox 360	17%	20%
DAB digital radio	27%	31%
Tablet computer	30%	11%
ebook reader	17%	12%

Base: circa 1,000 GB adults aged 15+: Quarter 3 2013

Source: Ipsos MORI

TRENDS IN EQUIPMENT OWNERSHIP IN THE HOME

WHICH OF THE FOLLOWING DO YOU OWN/HAVE IN YOUR HOUSEHOLD?

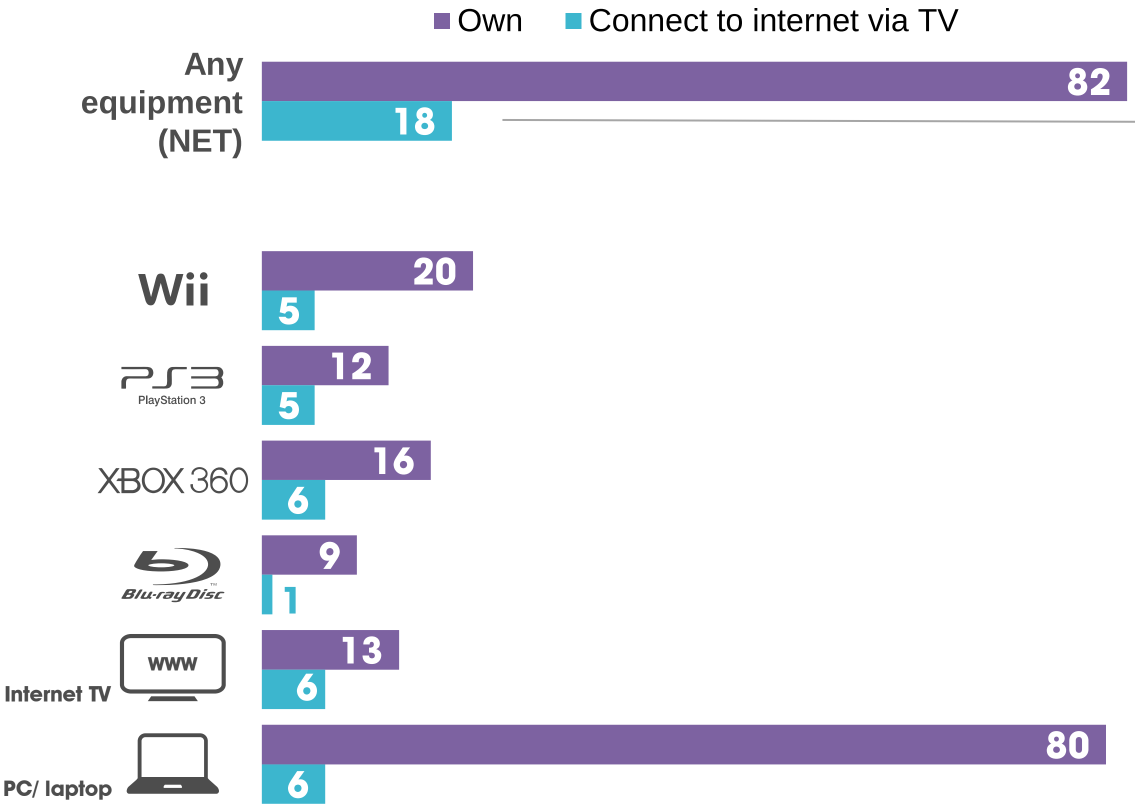


Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

ACCESSING THE INTERNET VIA A TV

% USING EQUIPMENT TO ACCESS THE INTERNET VIA TV: Quarter 3 2013



TOP 10 activities online via TV

Catch-up TV	40%
Online games	39%
Video clips	28%
Online films	19%
Browse web	14%
Social ntwkg	12%
Online shopping	11%
Emails	11%
Online music	8%
Online banking	7%

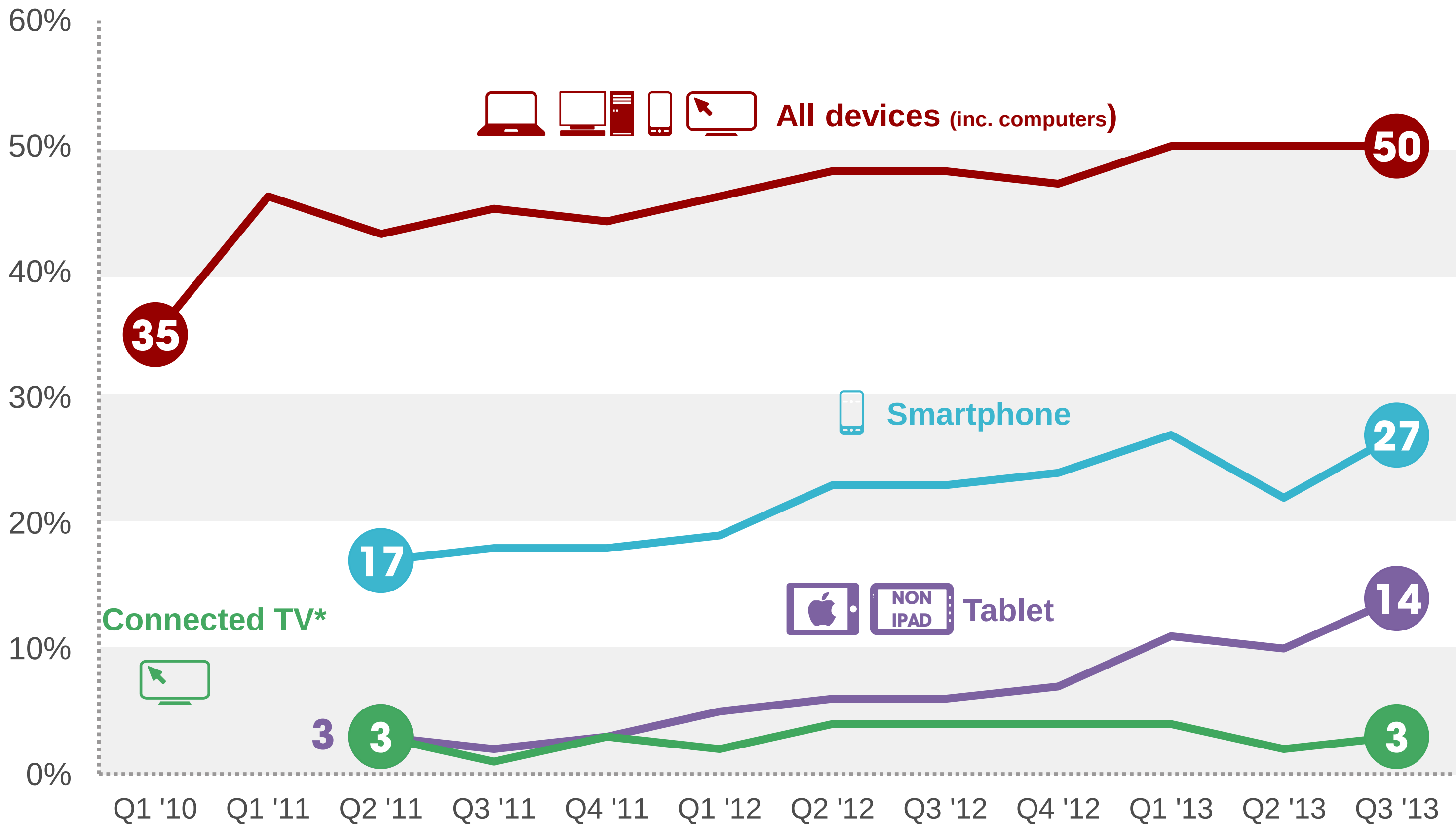
Base: circa 2,000 GB adults aged 15+: Q2/Q3 2013

Source: Ipsos MORI

SOCIAL NETWORKING

TRENDS IN VISITING SOCIAL NETWORKING SITES

VISITING SOCIAL NETWORK SITES



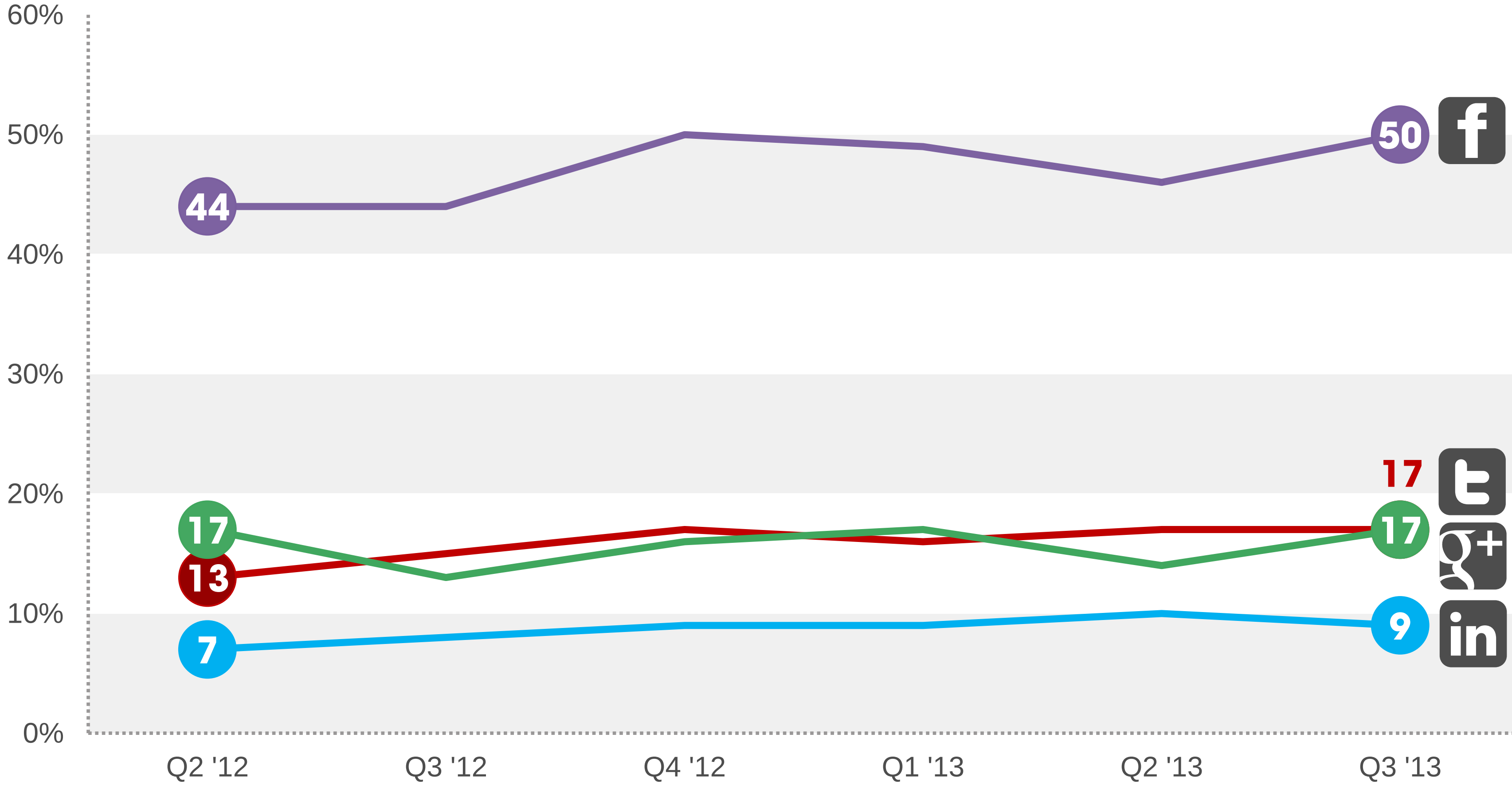
Connected TV* - Games console, web enabled TVs and PCs connected to a TV

Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

TRENDS IN SOCIAL NETWORKING SITES VISITED

% VISITED IN LAST 3 MONTHS



Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

PROFILE OF FACEBOOK USERS

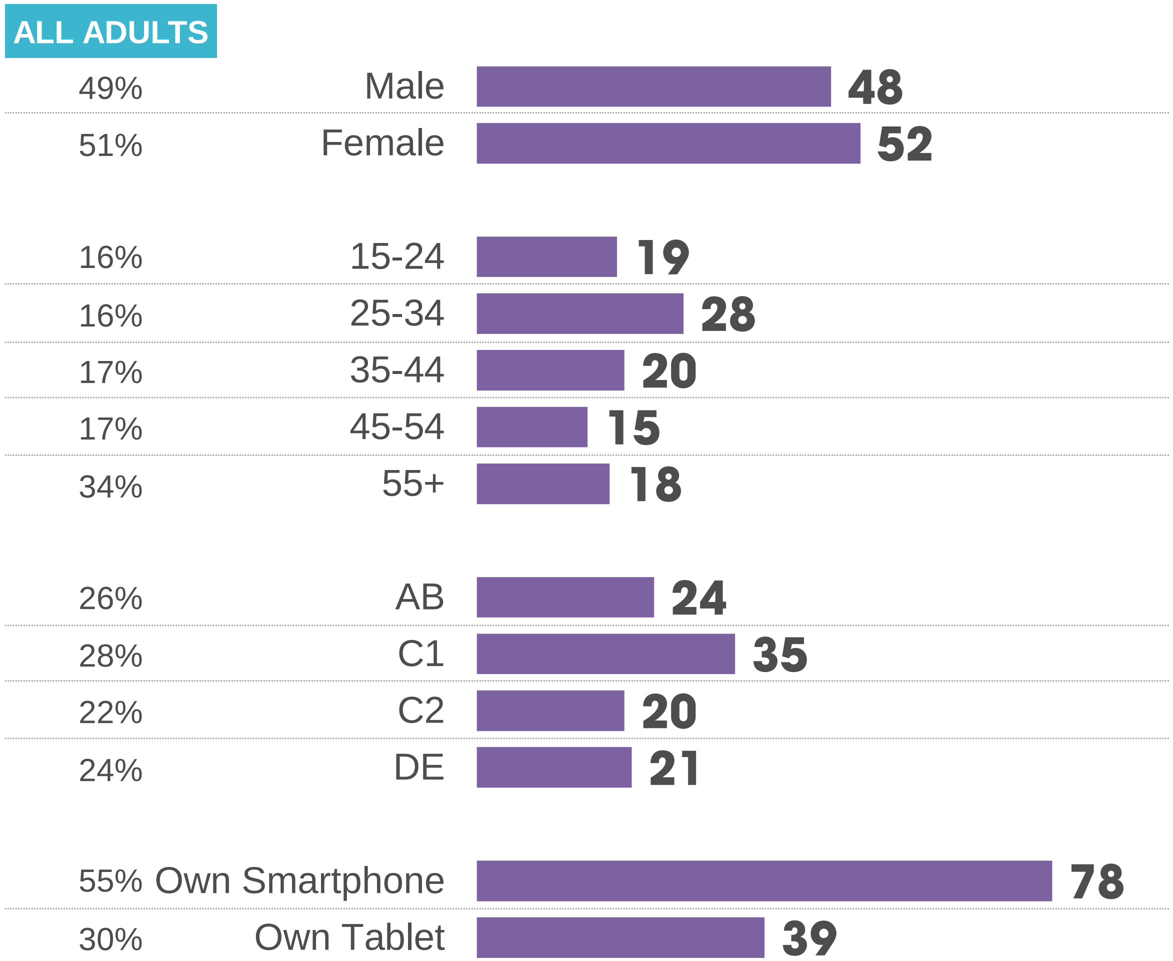
ALL ADULTS		Facebook users
49%	Male	47
51%	Female	53
16%	15-24	25
16%	25-34	26
17%	35-44	19
17%	45-54	16
34%	55+	14
26%	AB	27
28%	C1	32
22%	C2	19
24%	DE	23
55%	Own Smartphone	77
30%	Own Tablet	39

The profile of Facebook users when compared to the national population is younger. Ownership of Smartphone and Tablet is also higher amongst Facebook users in comparison to the national population.

Base: circa GB adults (1,000) / All visiting / using Facebook in last 3 months (496) : Q3 2013

Source: Ipsos MORI

PROFILE OF GOOGLE+ USERS



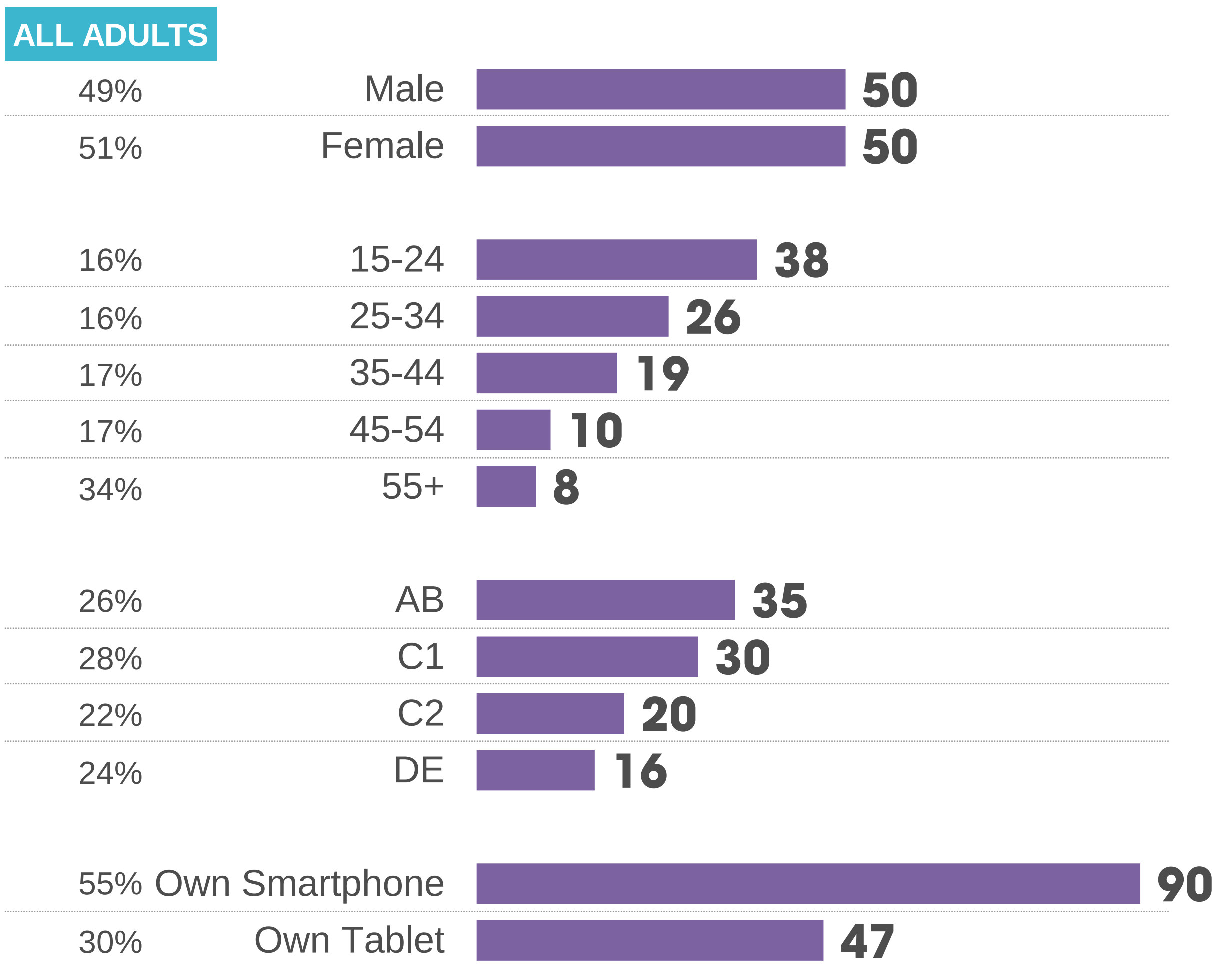
In contrast to Facebook, Google+ has captured fewer users aged 15-24, but more in the higher age groups.

Smartphone & Tablet penetration is now on par with Facebook.

Base: circa GB adults (1,000) / All visiting / using Google+ in last 3 months (180) : Q3 2013

Source: Ipsos MORI

PROFILE OF TWITTER USERS



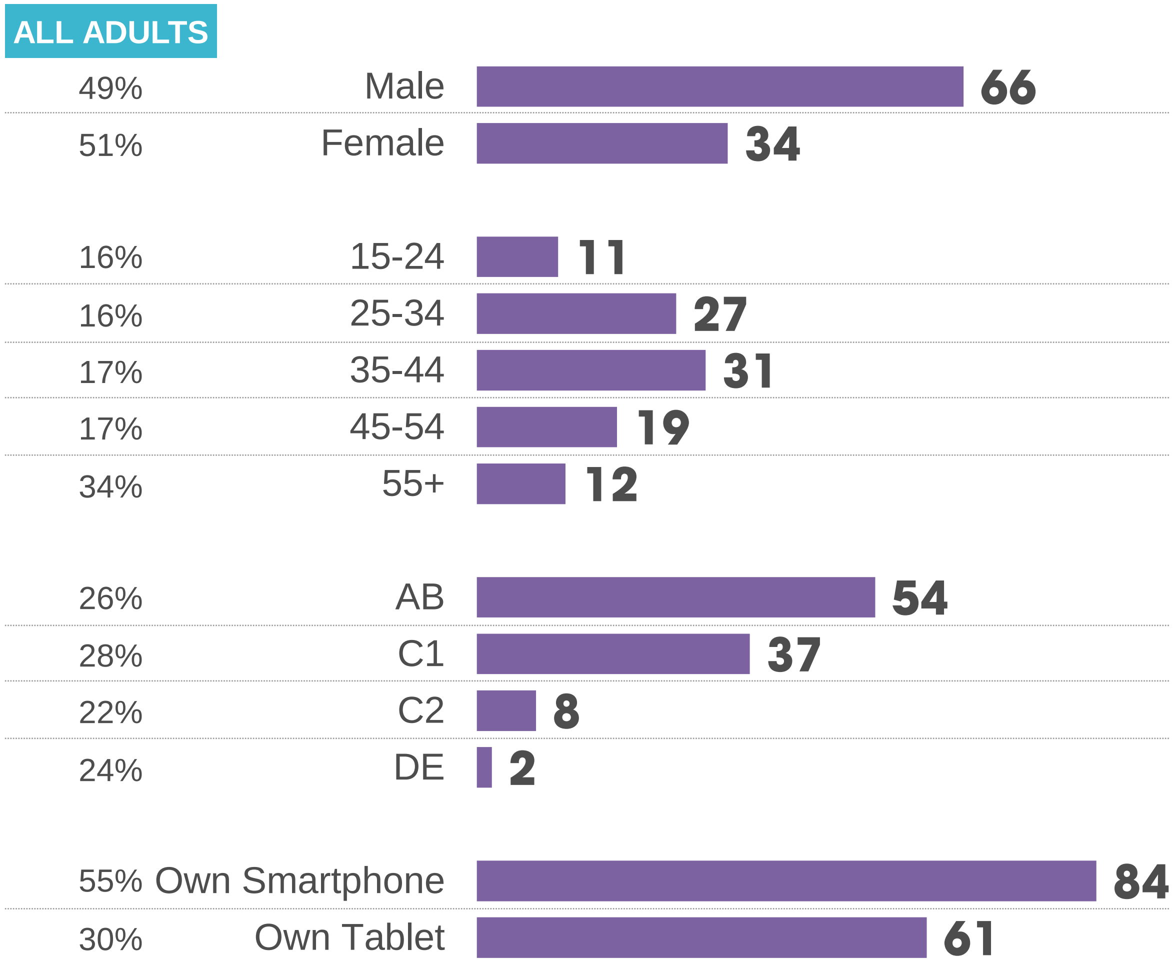
Twitter users are young : over half of them are aged under 35.

They are also more likely to be AB or C1 social grade and very mobile: 90% of them own a Smartphone, 47% a Tablet.

Base: circa GB adults (1,000) / All visiting / using Twitter in last 3 months (164) : Q3 2013

Source: Ipsos MORI

PROFILE OF LINKEDIN USERS



Linkedin is a more specific social network : its users skew heavily towards males and more than half are social grade AB.

Consequently, the ownership level for a Tablet is over twice that of the country average.

Base: circa GB adults (1,000) / All visiting / using Linkedin in last 3 months: (80) Q3 2013

Source: Ipsos MORI

PROFILE OF YOUTUBE USERS

ALL ADULTS		
49%	Male	51
51%	Female	49
16%	15-24	25
16%	25-34	22
17%	35-44	20
17%	45-54	19
34%	55+	14
26%	AB	28
28%	C1	31
22%	C2	20
24%	DE	22
55%	Own Smartphone	75
30%	Own Tablet	41

YouTube

Almost half of YouTube users are aged under 35. There is a more even spread of social grades using this website than other social networks.

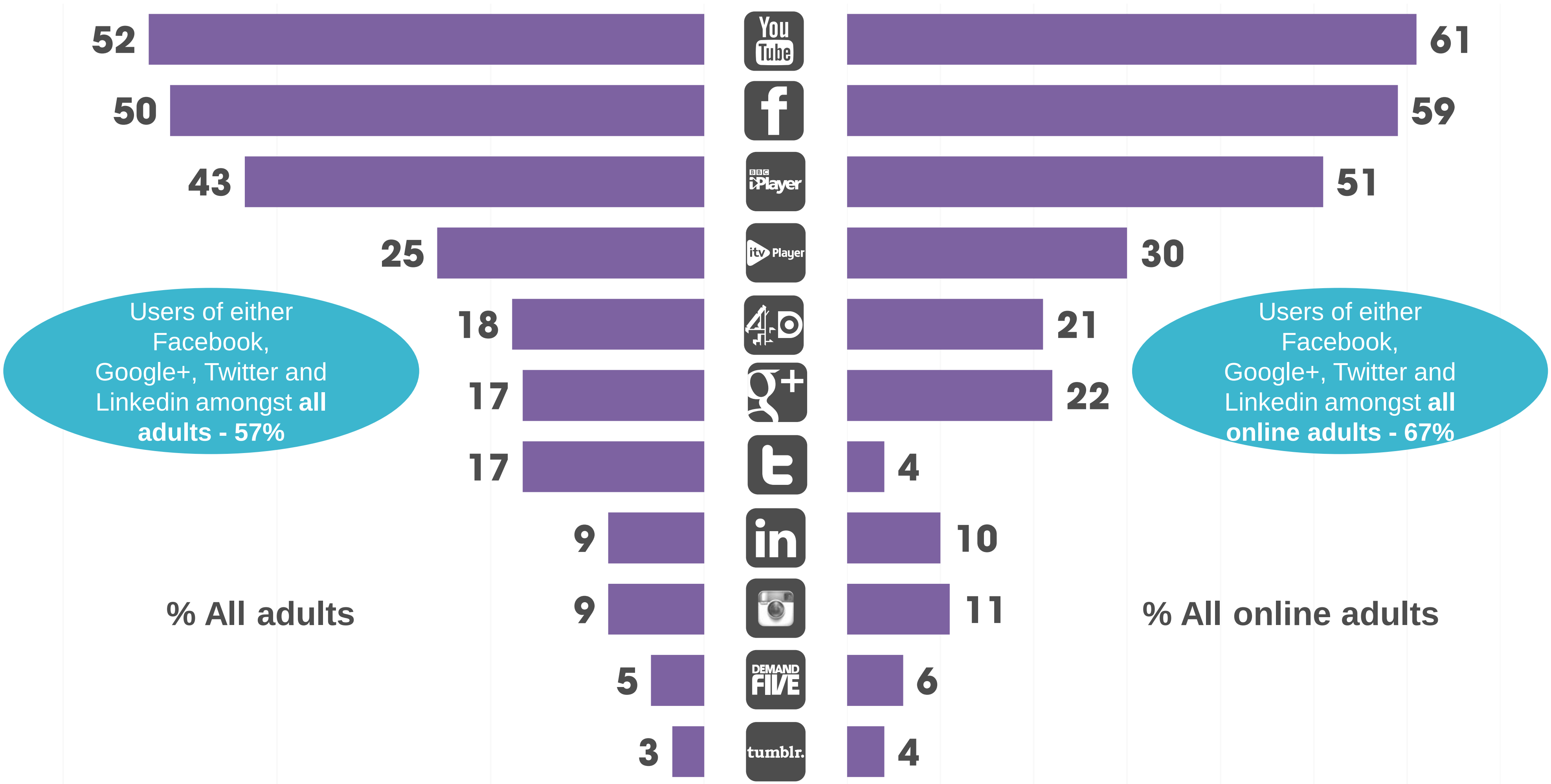
Ownership levels of Smartphone and Tablet are higher than average.

: Base: circa GB adults (1,000) / All visiting / using YouTube in last 3 months: (512) Q3 2013

Source: Ipsos MORI

WEBSITES VISITED OR USED IN THE LAST 3 MONTHS

% VISITED IN LAST 3 MONTHS – Quarter 3 2013



Base: circa GB adults 1,000 adults aged 15+: Q3 2013

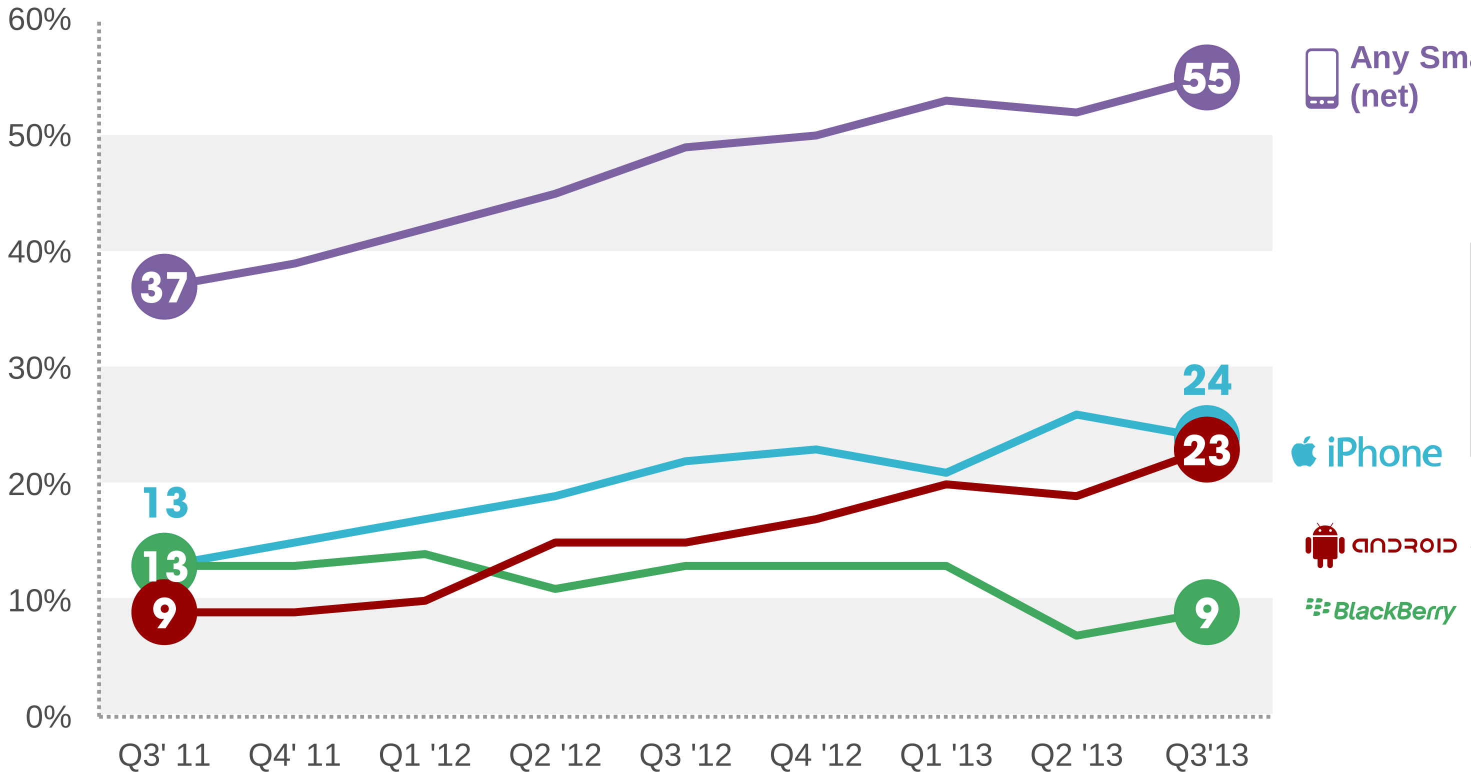
Base: 840 GB online adults aged 15+: Q3 2013

Source: Ipsos MORI

SMARTPHONE OWNERSHIP

GROWTH IN SMARTPHONES

% OWN BLACKBERRY VS. IPHONE VS. ANDROID



Customer profile

iPhone	
Males 15-34	25%
Males 35+	25%
Female 15-34	23%
Females 35+	27%

Android	
Males 15-34	23%
Males 35+	33%
Female 15-34	19%
Females 35+	25%

BlackBerry	
Males 15-34	20%
Males 35+	30%
Female 15-34	23%
Females 35+	27%

Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

WHO OWNS A SMARTPHONE

% OWN A SMARTPHONE BY GENDER AND SOCIAL GRADE ACROSS 2012- 2013

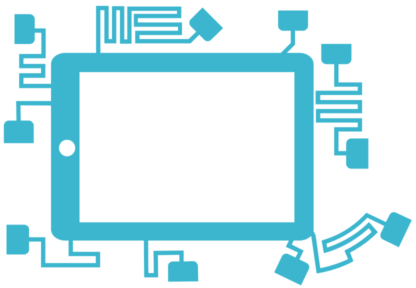
	All	15-24	25-34	35-44	45-54	55-64	65+
Males	57	79	78	71	62	36	15
Males AB	61	79	92	86	73	47	23
Males C1	63	82	84	76	70	34	14
Males C2	53	79	71	58	60	34	9
Males DE	47	76	67	56	43	20	7
Females	48	77	71	70	45	27	11
Females AB	55	87	84	80	52	44	23
Females C1	54	84	80	77	47	26	6
Females C2	42	75	62	60	41	18	7
Females DE	39	67	61	56	38	11	7

0-49% 50-69% 70-100%

Base: circa 4,000 GB adults aged 15+: Q4 2012/ Q1/Q2/Q3 2013

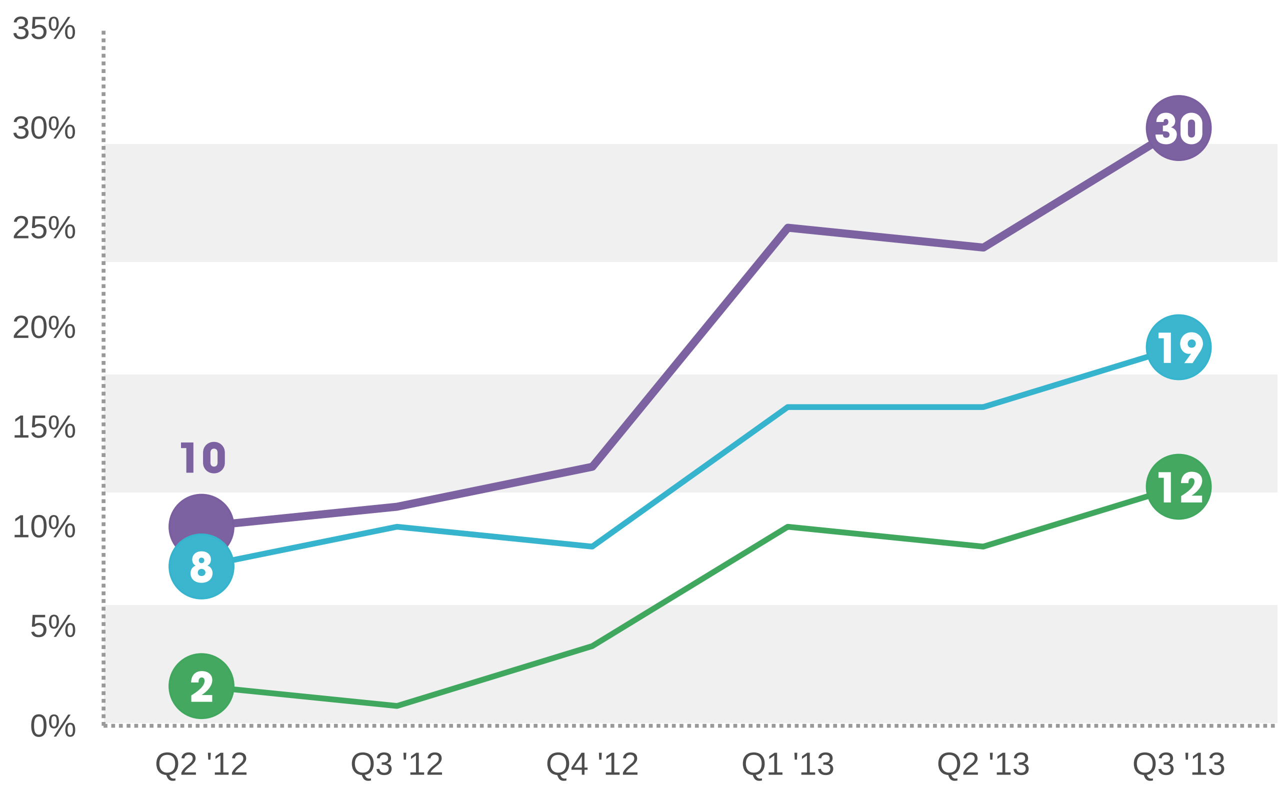
Source: Ipsos MORI

TABLET OWNERSHIP



GROWTH IN TABLETS

% OWN A TABLET IN THE HOUSEHOLD



Any Tablet

iPad

Tablet (non iPad)

Customer profile

Any Tablet	
Males 15-34	16%
Males 35+	32%
Female 15-34	17%
Females 35+	34%

iPad	
Males 15-34	15%
Males 35+	28%
Female 15-34	20%
Females 35+	37%

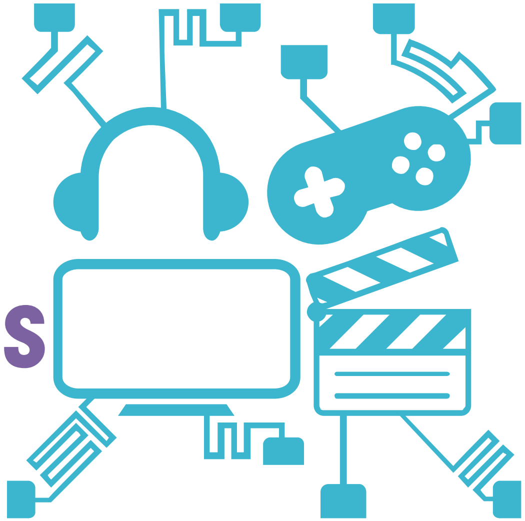
Non iPad	
Males 15-34	18%
Males 35+	39%
Female 15-34	12%
Females 35+	31%

Base: circa 1,000 GB adults aged 15+ per wave

Source: Ipsos MORI

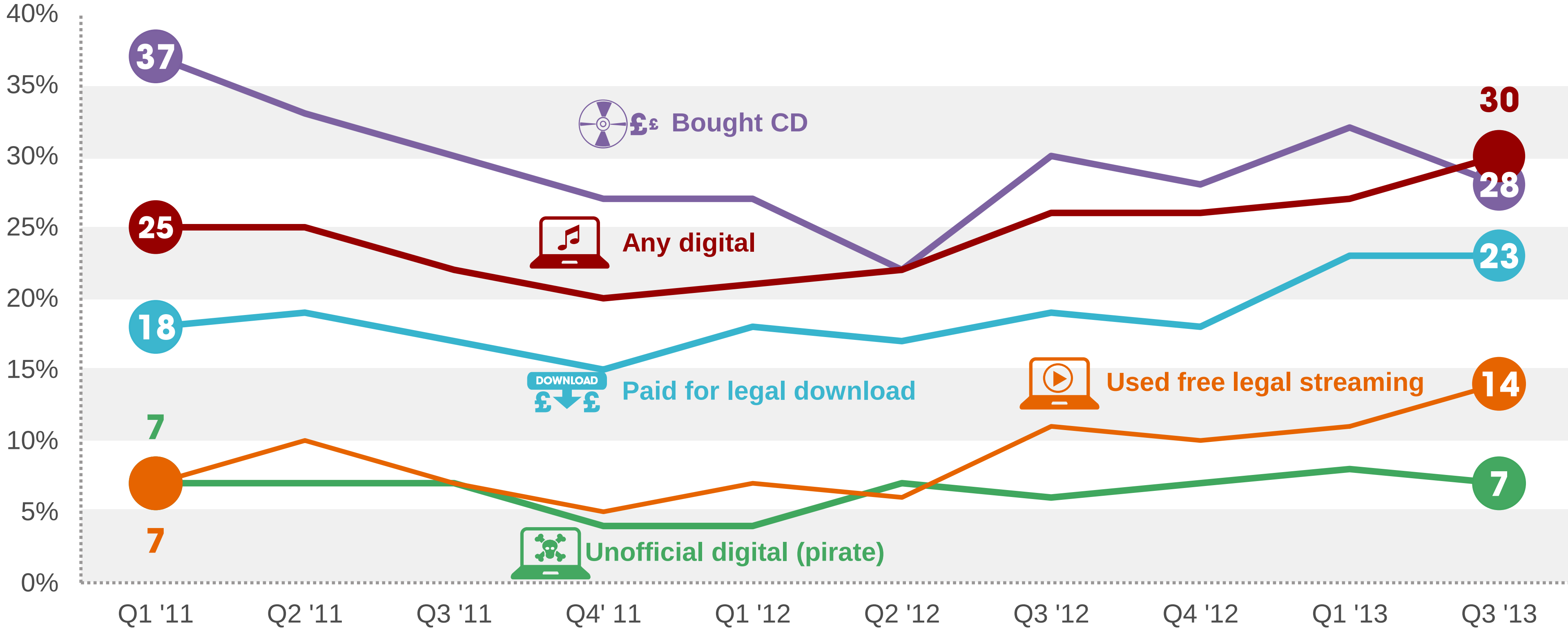
CONTENT CONSUMPTION

MUSIC / GAMES / TV / MOVIES



HOW WE CONSUME MUSIC

MUSIC CONSUMPTION

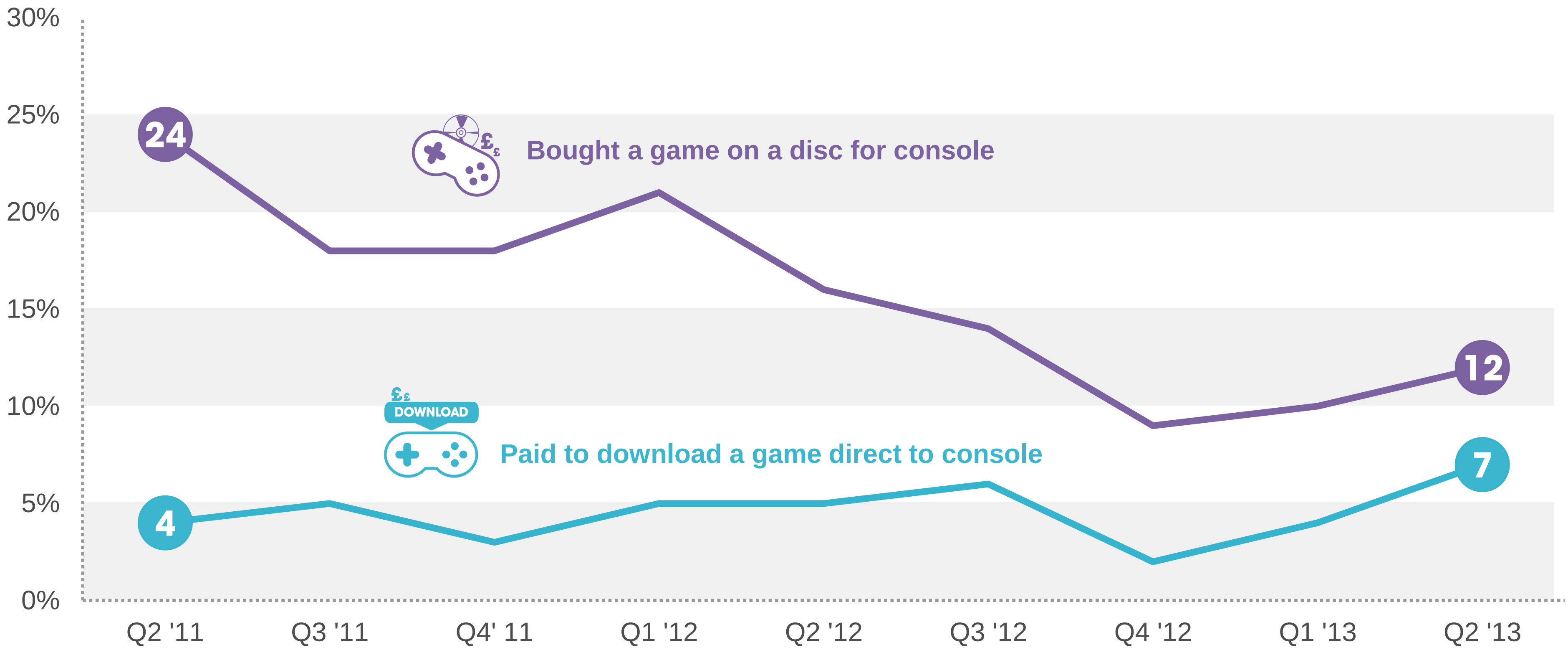


Base: circa 1,000 GB adults aged 15+ per wave / Music consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE CONSUME GAMES FOR CONSOLES

GAMES CONSUMPTION

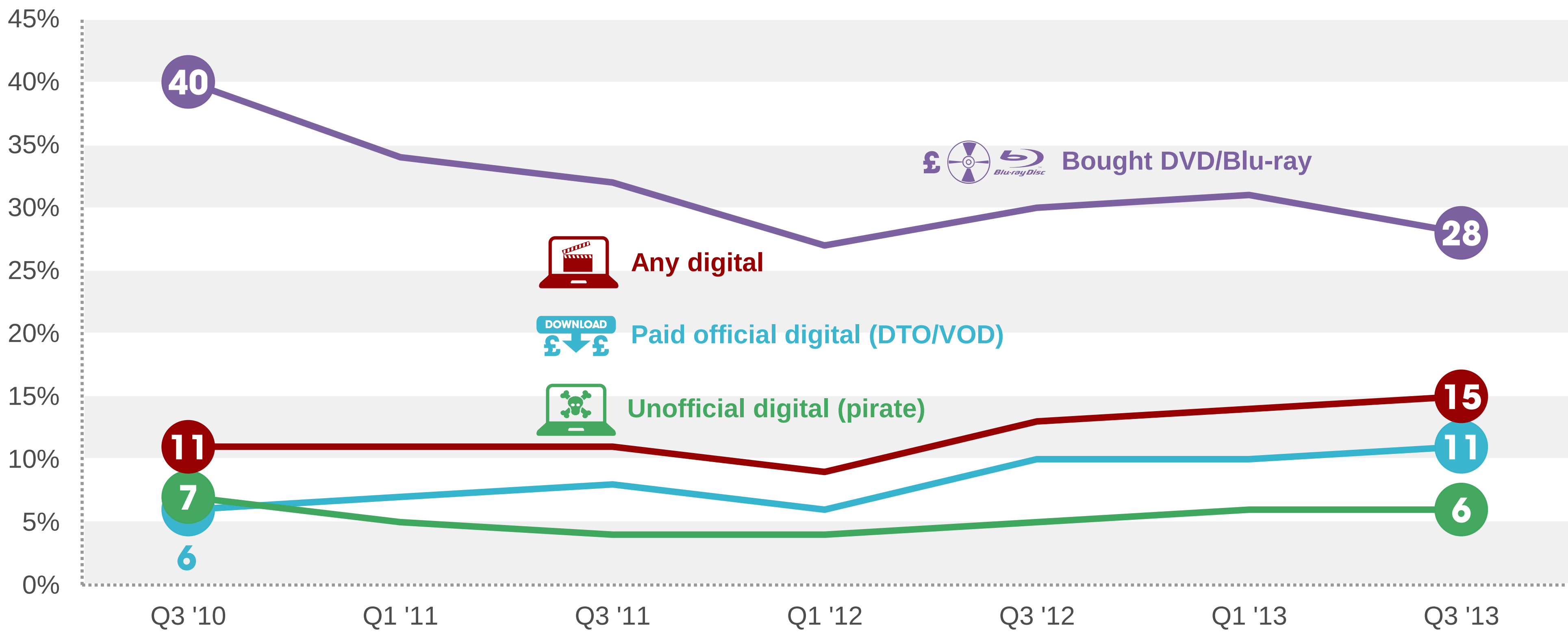


Base: circa 1,000 GB adults aged 15+ per wave/ Games consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS MOVIES

MOVIE CONSUMPTION

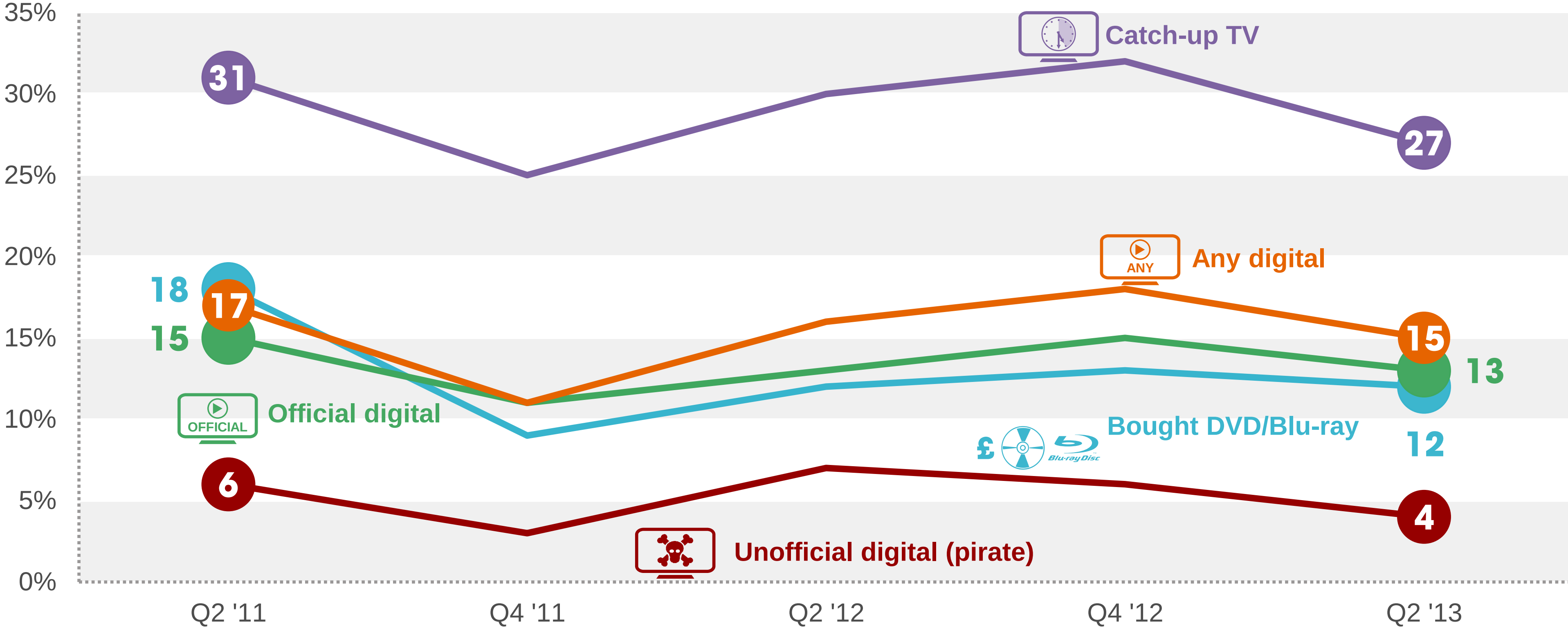


Base: circa 1,000 GB adults aged 15+ per wave / Movie consumption is tracked every 6 months

Source: Ipsos MORI

HOW WE ACCESS TV SERIES

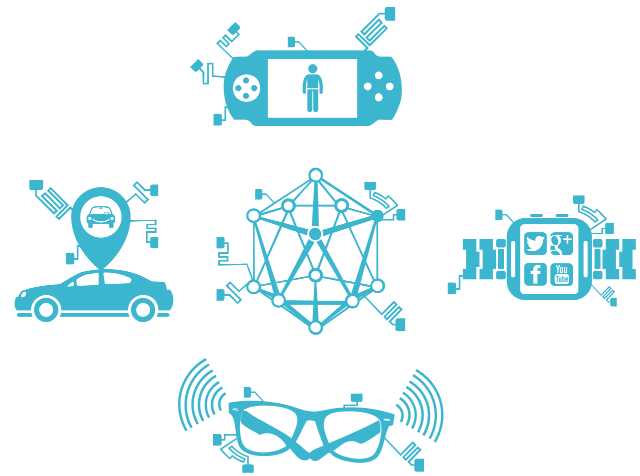
TV SERIES CONSUMPTION



Base: circa 1,000 GB adults aged 15+ per wave/ TV consumption is tracked every 6 months

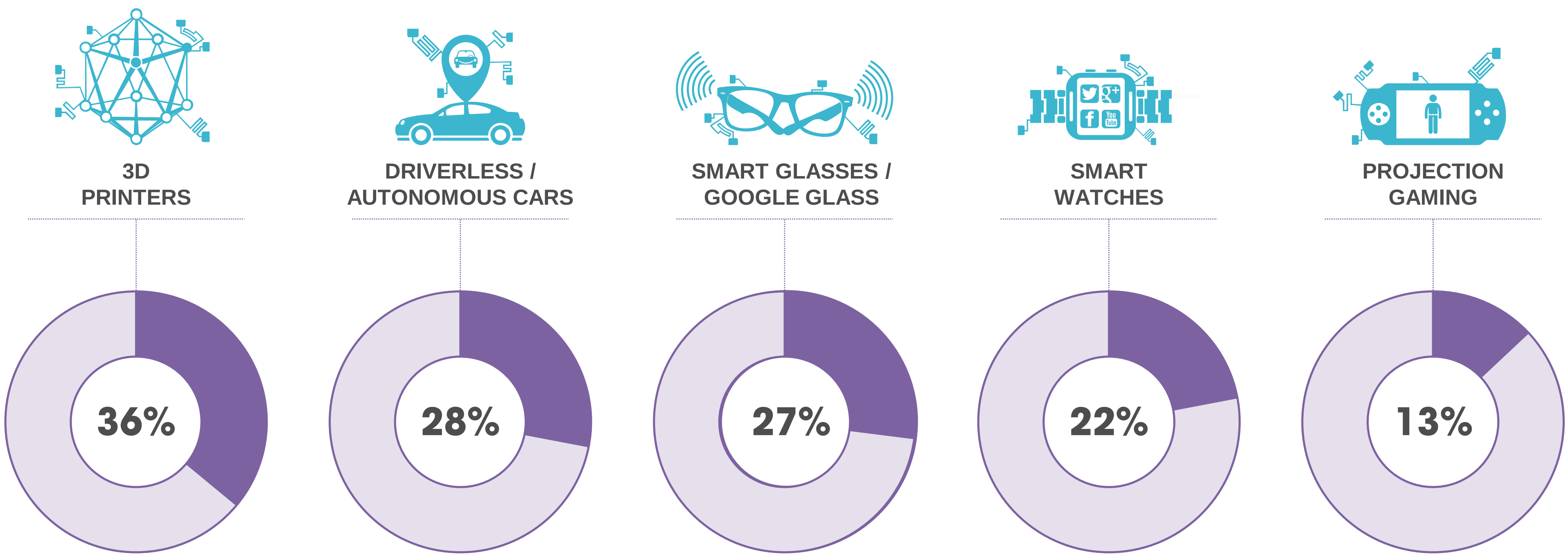
Source: Ipsos MORI

FUTURE TECH MONITOR



NEW TECHNOLOGY AND PRODUCT AWARENESS

AWARENESS OF NEW TECHNOLOGY/PRODUCTS : Quarter 3 2013



Base: circa 1,000 GB adults aged 15+: Q3 2013

WHO IS AWARE OF THESE TECHNOLOGY & PRODUCTS

% AWARE BY AGE, GENDER AND SOCIAL GRADE : Quarter 3 2013

	3D Printers	Driverless / Autonomous cars	Smart Glasses / Google Glass	Smart Watches	Projection Gaming
All adults	36	28	27	22	13
Males	44	37	35	27	18
Females	27	19	20	18	7
15-34	37	28	36	27	18
35+	35	27	23	20	10
ABC1	46	36	36	29	14
C2DE	24	18	18	14	10

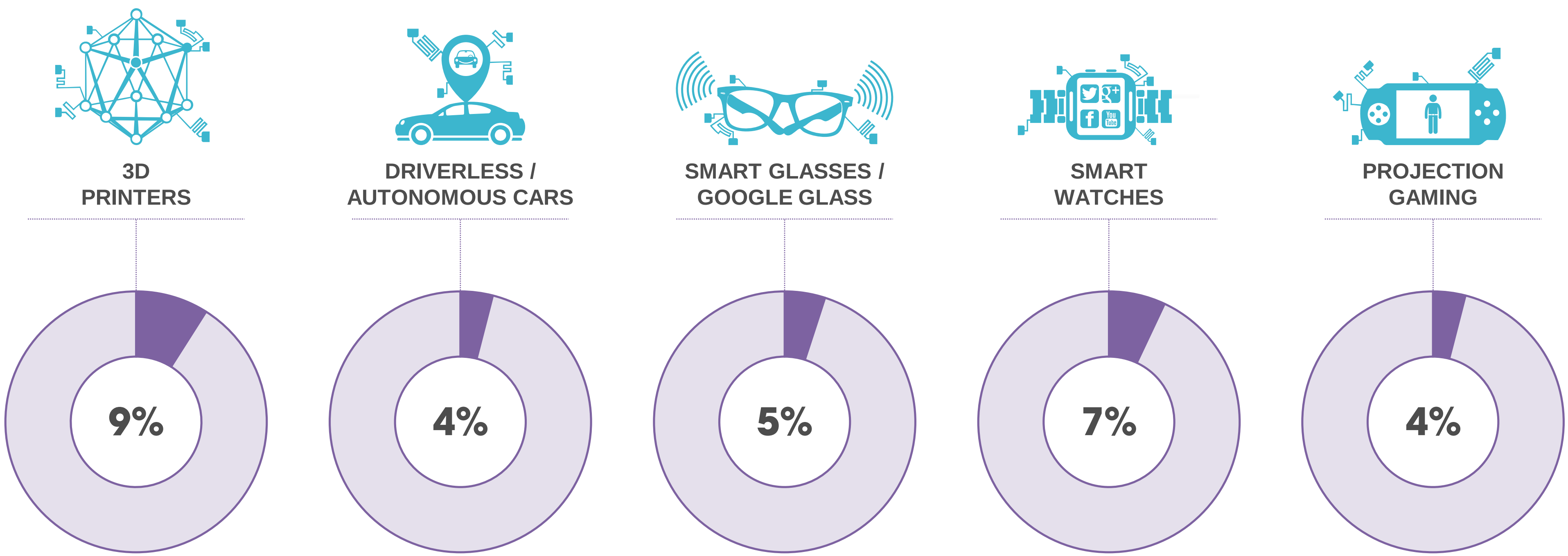
0-9% 10-24% 25%+

Base: circa 1,000 GB adults aged 15+: Q3 2013

Source: Ipsos MORI

PURCHASE INTEREST

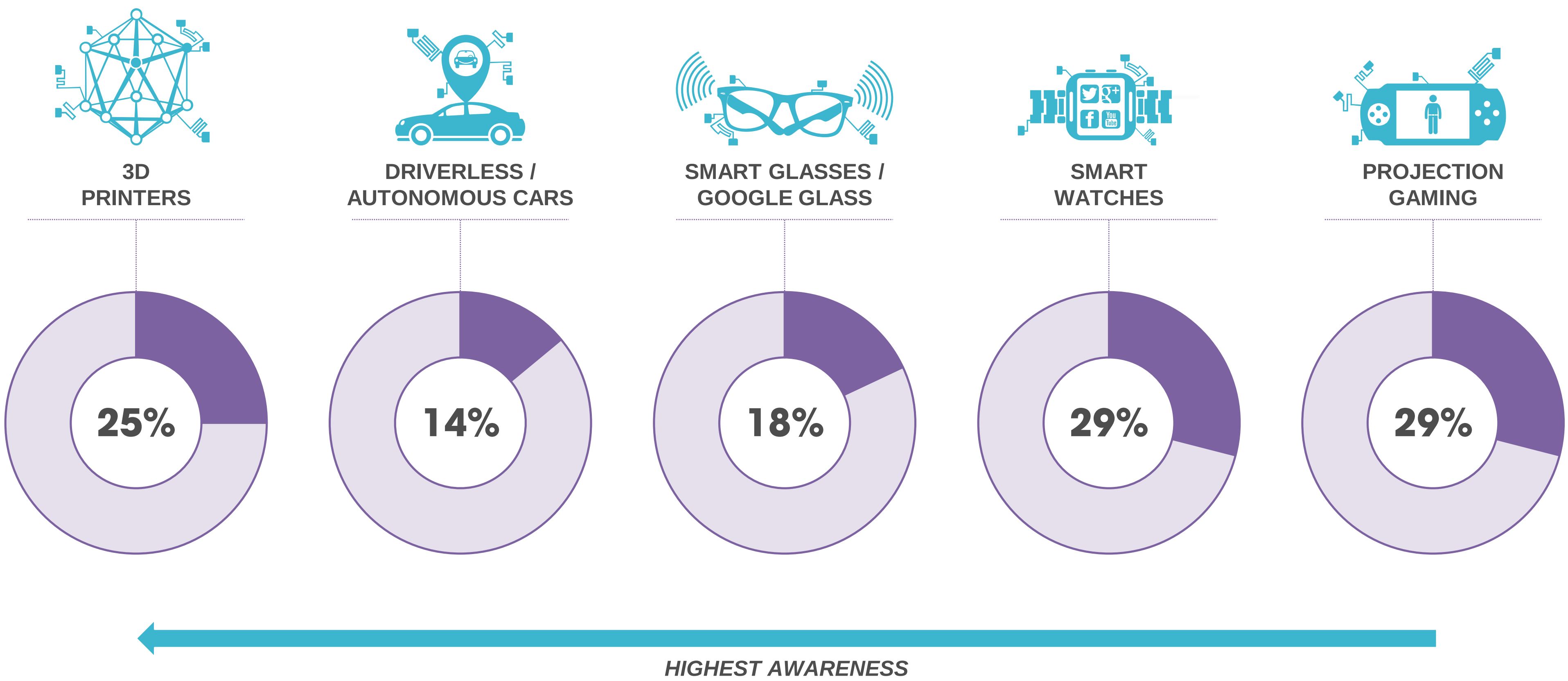
% AWARE & INTERESTED IN PURCHASING (AMONGST ALL): Quarter 3 2013



Base: circa 1,000 GB adults aged 15+: Q3 2013

PURCHASE INTEREST IN DETAIL

% PURCHASE INTEREST (AMONGST AWARE): Quarter 3 2013



Base: All GB adults aware of each product : Q3 2013 (3D Printers = 362, Driverless Cars = 280, Smart Glasses = 278, Smart Watches = 227, Projection Gaming = 127)

TECH TRACKER TECHNICAL DETAILS

Ipsos MORI interviewed a quota sample of **1026 adults aged 15+ in GB.**

The latest interviews were carried out face to face **19th July – 26th July 2013.**

Data is weighted to a **nationally representative profile.**

A variety of other demographic breakdowns are available, including working status, household composition, ethnicity, income and newspaper readership.

The standard Ipsos MORI terms and conditions apply to this report, as with all studies the company undertakes. No press release or publication of the findings shall be made without the prior approval of Ipsos MORI. Approval will only be withheld on the grounds of inaccuracy or misinterpretation of results. Ipsos MORI reserves the right to amend the Internet Usage Statistics at any time.

If you are **interested in adding a question(s)** these can be added for a single measure on a single wave or on a tracking basis.

While the Tech Tracker is a multi-client study, results of customised questions would be made available exclusively to you.

FURTHER INFORMATION

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About Ipsos MediaCT

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Winner - 2011 MRS Awards: “Best Innovation”